

# Chemicals for Household, Industrial, and Institutional Cleaning Applications 2010 Database

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**Base Year: 2009**

*Chemicals for Household, Industrial, and Institutional Cleaning Applications 2010 Database* is an interactive database containing demand estimates for chemicals used within household, industrial, and institutional cleaning (HI&I) applications in key regional markets of the world.

	Household	Industrial	Institutional
<b>Core Program</b>			
Europe	✓	✓	✓
United States	✓	✓	✓
China	✓	-	-

Data is presented in several different views, including supplier, chemical type, and application, and helps answer key questions such as:

- What are the sales of chemicals for HI&I applications by supplier and end-use in each region?
- Which suppliers are active and which HI&I chemicals are they supplying?
- What is the historical consumption of HI&I chemicals for each end-use application?
- What are the average prices of various chemicals by application?
- What is the forecast consumption of HI&I chemicals in 2014 by application, product type, and region?

The database is updated annually, and subscribers will need to renew their subscriptions yearly.

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## Database Scope

*Chemicals for Household, Industrial, and Institutional Cleaning Applications 2010* provides a detailed quantitative appraisal of the market including current and forecast demand by major product, pricing analysis, competitive landscape, and supplier share.

HI&I chemicals covered in this program are grouped into the following categories. Please refer to Table 1 for a more detailed segmentation:

- Antibacterial and odor-control technologies
- Enzymes
- Fragrances
- Functional polymers and organic sequestrants
- Rheology control agents
- Specialty bleaches, bleach activators, and optical brighteners
- Specialty silicones
- Solvents
- Surfactants

The interactive functions of the database allow users to customize views according to region, chemical type, and supplier. Data includes:

- Consumption of key HI&I chemicals by application and region
- Supplier sales by chemical type, application, and region
- Average market pricing of chemical by region
- Forecast consumption within a five-year timeframe

NOTE: Industrial and institutional data is only be available for the United States and Europe.

The base year for this program is 2009 and includes forecasts to the year 2014.

## Key Benefits

This global program enables marketing and product managers and directors within chemical organizations serving the household, industrial, and institutional cleaning products industry to understand the evolution of the market in each significant region, product group, and application. As a result, subscribers are better positioned to exploit identified business opportunities at a day-to-day operational level and during the strategic planning process.

This program provides subscribers with:

- A reliable and independent assessment of the market for chemicals within household, industrial, and institutional cleaning products, enabling each subscriber to understand the context in which each regional business operates
- Identification of key growth by product and application to enable development of targeted sales and marketing strategies to exploit high growth areas
- Forecasting scenarios from which to base solid strategic business plans

## Functionality

*Chemicals for Household, Industrial, and Institutional Cleaning Applications 2010 Database* is easy to use and is accessible online by anyone in your organization from any enterprise location where HI&I chemical demand data is needed. A subscription includes enterprise-wide access using a single account code and password. Data can also be exported to Excel format from the online interface.

The database report features the FutureView forecasting tool, which allows users to easily change variables to run various "what if" demand scenarios that will help shape business strategy development.

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**Table 1: Product Segmentation**

Product group	Segment	Product
Antibacterial and odor-control technology	Antibacterials	Biguanides Formaldehyde formers Hydantoins Isothiazolinones Quats
	Odor-control agents	Cyclodextrins Zinc salts
Enzymes		
Fragrances		
Functional polymers and organic sequestrants	Functional polymers	Polyacrylates Carboxy methyl cellulose (CMC) Others (e.g., HEC)
	Organic sequestrants	Polyvinylpyrrolidone (PVP) Others (e.g., SMA)
Rheology control agents	Inorganics	Bentonite Hectorite Others (e.g., MAS)
	Synthetic organics	Carbomer ASE Others (e.g. HASE )
	Gums	Xanthan Others (e.g., guar)
Specialty bleaches, bleach activators, and optical	Specialty Bleaches	
	Bleach activators	
	Optical whiteners	
Specialty silicones	Non-functionalized fluids	
	Functionalized fluids	
	Copolymers	
Solvents		
Surfactants	Cationics	Quaternaries Amine oxides
	Non-ionics	Ethoxylates Alkyl polyglucosides Alkanolamides Sorbitan esters
	Amphoterics	Betaines Amphoteric acetates
	Anionics	Phosphate esters Ether carboxylates Sarcosinates

**Table 2: Household, Industrial, and Institutional Application Segmentation**

Laundry care	Hard surface cleaners	Dish care	Deodorizers and disinfectants	Floor care
Product examples include:				
<ul style="list-style-type: none"> <li>■ Bleaches and laundry boosters</li> <li>■ Laundry detergents</li> <li>■ Fabric softeners</li> <li>■ Prewash stain removers</li> <li>■ Water conditioners</li> </ul>	<ul style="list-style-type: none"> <li>■ All-purpose cleaners</li> <li>■ Drain cleaners</li> <li>■ Glass cleaners</li> <li>■ Metal polishes</li> <li>■ Oven cleaners</li> <li>■ Toilet bowl cleaners</li> </ul>	<ul style="list-style-type: none"> <li>■ Automatic dishwasher detergents</li> <li>■ Rinse aids</li> <li>■ Light-duty liquid detergents</li> </ul>	<ul style="list-style-type: none"> <li>■ Air fresheners</li> <li>■ Carpet deodorizers</li> <li>■ Disinfectants</li> </ul>	<ul style="list-style-type: none"> <li>■ Floor care products</li> <li>■ Polishes and dusting aids</li> </ul>

## Methodology

Kline is unmatched in our ability to gather hard-to-get market and competitive intelligence with a high degree of confidence. Kline's market analysis approach places the principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable.

During the course of field research, Kline's professional staff of industry experts conducted in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including leading manufacturers and marketers of chemicals for household, industrial and institutional cleaning applications, leading end users and representatives from pertinent government agencies and trade associations.

This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities. Primary research is comprised of 95% of the overall research methodology for this database.

In addition, this analysis is supplemented by secondary research drawn from the review of suppliers' product literature and price lists; a search of recent trade and technical literature; Internet sources; and analysis of statistical data from government, industry, and trade associations and agencies.

## Kline Credentials

Kline is a worldwide consulting and research firm dedicated to providing the kind of insight and knowledge that helps companies find a clear path to success. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for over 50 years.

Kline's research and consulting services extend across the entire chemicals industry value chain. Our solutions have helped clients develop better ways to create and profit from new business opportunities, respond to competitive and economic threats, improve productivity, achieve sustainable growth, and optimize performance. Kline provides clients with facts, forecasts, and recommendations based solidly on the realities of the market.

Our market research reports and services are designed to provide subscribers with a deeper understanding of their markets, an outlook for their business, and accurate information about their competitors. Our clients tell us they often use Kline's market research to validate their own internal analysis, and many clients rely on Kline reports as their most critical source of information.

For more information about this study or Kline's other services, e-mail us at [sales@klinegroup.com](mailto:sales@klinegroup.com), visit our website at [www.KlineGroup.com](http://www.KlineGroup.com), or contact us at any of our regional offices listed below.

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- Household Cleaning Products USA 2008
- Food Service Cleaning Products USA 2008
- Home Fragrances 2007: U.S. Market Analysis and Opportunities
- Household Cleaning Products USA 2007
- Home Fragrances USA 2006
- Household Cleaning Products USA 2006
- Specialty Raw Materials for Home and Fabric Care Products, 2004